PLUS
BUSINESS
Can diversification cut revenue losses?

- Detroit's Barden backs off dual trunk in pre-pact plea
- '88 Olympics execs talk pay-per-view with major ops
- NCTA, cities try it again on dereg bill compromise
- Yankee ops ponder alternate tech moves at NECTA

CableVision™

/s and features weekly of the cable television industry August 13, 1984

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Taking to the air: Getting into mobile radio

CableVision

This Week in Cable, pages 15-20 August 13, 1984, Volume 9, Number 50

BARDEN GOES FOR CONCESSIONS

Barden Cablevision, holder of Detroit's cable franchise award, is going after concessions for its venture—led by a proposal for a 550 MHz single-cable system with 79 channels instead of a promised 124-channel, dual-cable operation.

PPV FOR 1988 OLYMPICS?

Agents for the 1988 Summer Olympics are discussing the possibility of selling pay-per-view rights for a number of games to a consortium of the nation's top cable operators.

4103: NCTA POWWOWS WITH CITIES

Four of six city negotiators met with NCTA officials last week to hear formal requests from the cable industry on desired modifications to H.R. 4103. While the meeting was described as "cordial," cities' spokespeople maintain major renegotiation of bill will not happen.

NECTA DRAWS OPS, EXHIBITORS

Some 850 operators and exhibitors gathered in Sturbridge, Mass., to conduct business at a leisurely pace during the New England Cable Television Association's annual convention last week.

CTAM: BIG PLANS FOR CONFERENCE

The Cable Television Administration and Marketing Society holds its 10th annual conference next week in New York. Determining "critical success factors" for the industry will be the centerpoint of CTAM's event.

What's in the sections

PROGRAMMING 21

The Miami News starts a daily local news service over Dade County's educational access cable channel. And Robert DiMatteo monitors the effect of commercials on Nickelodeon.

MARKETING/ADVERTISING 22

Reports of "flattening revenues" for the industry are "overexaggerated," according to Charles Kadlec, a cable management consultant. In an address before the Denver Cable Club, he said systems could counter slow revenue growth with a strong local ad sales effort—and, eventually, with pay-per-view event programming.

BUSINESS 34

Is there a place for cable operators in the direct broadcast satellite and long-distance telecommunications businesses? Representatives from MCI and Satellite Television Corp. think so, and relayed the message to attendees of the New England Cable Television Association last week.

GOVERNMENT & LAW 36

Cox Cable of Tucson has challenged a Copyright Office ruling preventing the substitution of distant signals for rate grandfathered independents. In a suit filed in federal court, the cable company said the Copyright Office ruling contradicts FCC guidelines still in effect.

Departments

NEWSWIRE 11
CABLESCOPE 13
LEADING THE WEEK 15
STOCK MARKET 34
TECHNOLOGY 37
CLASSIFIEDS 38
ADVERTISERS' INDEX 41
REGIONAL REPORT 42
CABLE STATS 46
PARTING WORDS 50

About the cover

Artist Earl V. DeWald sees mobile telephones as a part of everyone's life in the future.

Pages 24-33 **PLUS**

Cable branches out

Many cable operators are finding ways to exploit new services such as VCR rental and pay-per-view product in order to broaden their revenue bases. Senior Correspondent Paul McCloskey looks at the ways some industry players are turning competition to their own advantage. Also, Senior Editor Victoria Gits delves into the world of mobile telephone and radio paging.

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BPA

Making radio waves

Cable operators find the budding mobile telephone and radio paging business a way to branch out—if the conditions are right.

By Victoria Gits

If you're in the market for a growth opportunity, consider mobile telephone and radio paging—two businesses that have attracted the attention of newshounds, cable moguls, and multimedia tycoons alike.

The main appeal of these industries is the prospect that, ultimately, everyone will have a personal telephone in his car or a pencil-sized pager in his pocket. But the best part is, he will be paying a fee—month in and month out—for the privilege of using it.

A case in point is the Tandy Corp.'s $99 pager sold through Radio Shack stores across the country. Another is Metromedia Inc.'s toy-like "Li'l Bugger," which rents for $39.95 a year and $5 a month. MetroCall of Alexandria, Va., sells the whimsically named "Hippo-beepamus."

Obviously, the idea is to replace a mysterious, high-tech image with something warm and fuzzier. Sell to sis and little brother, not just Dr. Bob the obstetrician and peripatetic computer troubleshooters.

There are those who think the mobile telephone business will eventually go this way as well. The profit potential is luring some interesting competitors.

Cox Communications, for instance, just completed in June the $10 million purchase of CyberTel Corp.—a move that makes Cox the 90 percent owner of one of two cellular radio permits in the St. Louis market. It also puts Cox squarely in the radio paging business, with 11,000 subscribers. Cox has applications pending in Charlotte, N.C., Oklahoma City, and Omaha, as well.

United Cable Television apparently intends to make a big investment, having applied for 50 permits in 30 markets to compete in radio paging. United also has applied to be one of the country's three organizers of a nationwide paging network.

Continental Cablevision has filed 17 applications to operate cellular radio systems in the 31st to 90th largest markets. The MSO is going into business as a resale mobile telephone agent in Boston, and is close to buying a radio common carrier.

Another notable newcomer is MCI, which acquired Western Union International and its subsidiary, Airsignal International, serving 75,000 paging customers in 17 states.

Other cable names associated with the mobile telephone business are McCaw Communications and Colony Communications.

It should be noted at this point that we are talking about the radio common carrier (RCC) business, a traditionally slow-but-steady type of business, typically independently owned. An RCC owns, operates, leases, maintains, and delivers mobile communications equipment to private individuals.

An RCC's assets in the field consist of a fixed-base radio station and a transmitter network. Most RCCs offer both paging service and mobile telephone. All RCCs must be licensed by the Federal Communications Commission, and many must be approved by a state regulatory authority.

RCCs were not considered a glamor item until a couple of years ago when Metromedia Inc., the broadcasting conglomerate, made a giant play. In only two months, May and June 1982, Metromedia spent well over $100 million to buy six of the largest paging operations in the country (Beep Communications Systems and Radiofone Corp. in New York, Zip Call in Boston, Rogers Radio in Chicago, Radio Broadcasting Co. in Philadelphia, and ICS in Los Angeles), as well as an interest in a New York mobile telephone consortium.

Brian Deevy, vice president for investment services, Daniels & Associates: The pager business is growing at a rate of 30 to 35 percent per year, and, by 1990, users could number in the range of 10 to 20 million, compared to 2.2 million now.

With some 263,000 mobile and paging units among its subscribers, Metromedia comes close to beating the industry leader, Graphic Scanning, which has 275,000 subscribers in paging alone, through its subsidiaries, Digital Paging Systems and Radio Relay Corp.

Much interest also was stirred by Bill Daniels of Daniels and Associates in February, 1983 when the industry's most influential systems broker gave the business his endorsement. According to the Daniels newsletter of that month: "The real story of 1982 has been largely ignored, and that is the growth of the so-called 'personal communications' industry. We believe the growth potential of this industry in the 1980s is enormous, and we believe that cable operators are extremely well-positioned to take advantage of this opportunity. The question is, will they do so?"

The market for mobile telephone

Most observers will concede the time to get in on the ground floor of the blooming mobile telephone business has passed. It has been three years since the FCC voted in 1981 to allocate 20 MHz of spectrum to cellular radio systems—a long-awaited decision that did for the mobile telephone business what satellite delivery of Home Box Office did to the cable industry.

Since that time, most of the territory has been spoken for. The deadline to file applications for the 30 largest markets attracted 194 candidates in June 1982, and the FCC has already chosen the winners among the telephone company entries and most of the non-wireline contenders as well. (According to the formula worked out by the FCC, there would be two permittees allowed in each market: one telephone company or "wireline" concern and one independent or "non-wireline" firm.)

We are now down to the 90th through 120th largest markets, and the filing deadline was July 20, 1984.

Due to the overload of applications—500 were submitted for markets 31 to 60—the FCC has abandoned its "comparative hearing" process in favor of a lottery system. At press time, word was the fourth and final round had attracted more than 5,000 entries from speculators and individuals who need only prove they can find $1.5 million in start-up funds and submit a technically workable plan.

What the introduction of cellular technology did was greatly enlarge the system capacity. In Denver, for example, the old system was oversubscribed at 1,000 phones; but with the cellular system in place, capacity eventually will rise to 150,000 subscribers and 30,000 simultaneous conversations.

Experts believe the market for mobile telephones is huge, extending beyond units linked to cars to compact portables that people someday will carry everywhere, much like watches and pens.

In the meantime, the most widely quoted number, and the one used by the industry trade association, Telocator, is 1.5 million subscribers by 1990 (compared to 186,000 in 1982), representing a $2.7 billion market. Telocator pegs a growth rate at about 6 percent per year.

Another industry analyst, Frost & Sullivan, forecasts a total of 720,000

subscriber units will be sold between 1983 and 1988.

The market for mobile telephone, indeed may be enormous—but so is the start-up cost. The first cellular system to go on line, in October 1983, was Ameritech Mobile Communications of Chicago. It represents a $44 million capital investment. Its range is 2,500 square miles and its potential is 100,000 subs by 1990. The AMCI system slated for Cincinnati will cost over $12 million, the company estimates, and should attract 28,000 customers in five years.

The numbers explain why cellular telephones are prohibitively expensive, typically $2,500 for purchase and installation. Monthly charges are in the neighborhood of $150.

By the end of 1983, Ameritech counted 5,000 subscribers. By mid-July, 8,700 had signed on. To boost lagging sales, Ameritech lowered its monthly rate significantly, to $22 from $50, and reduced by 2 cents its per-minute rate. Everyone expects, of course, that, like computers and digital watches, the cost of mobile telephones will go down as penetration goes up.

In the meantime, getting in and staying in the cellular radio business is likely to require two things: a lot of patience and some very deep pockets.

The market for radio paging

There is a less expensive way to get in the personal communications game, and a way that its advocates say should mean big cash flow today, not in five years.

The business of selling personal pagers—commonly known as beepers—has changed dramatically in the last several years. In January 1982, the FCC allocated 38 low-band channels and 40 frequencies in the 900 MHz band, plus space for a nationwide paging service.

At the same time, equipment manufacturers introduced advance-designed units that were more convenient and less obtrusive. The new beepers, in fact, don't beep; they vibrate. Other models can display up to 80 characters per message on an LCD readout. Some even have printing ability.

Improved design and prospects for cross-country paging (ideal for business travelers) has provoked more than idle curiosity.

Daniels and Associates' Brian Deevy, vice president for investment services, says most of Daniels' major cable clients have inquired about the mobile radio and RCC business. Daniels closed several deals for Carolina's RCC in the last year and is actively working on acquisitions for about a dozen other companies, Deevy says.

Deevy figures the pager business is growing at a rate of 30-35 percent per year and, that by 1990, users could number in the range of 10 million to 20 million, compared with 2.2 million now. The larger number coincides with Telocator's estimate.

The main attraction of the paging business is that it is relatively less capital intensive than cable or cellular radio; yet it provides cash flow in the range of $20-$35 per month, per subscriber. It is said to generate cash profit that is 40-50 percent of sales; although it is treated as a regulated utility in most states, rate regulation has not been a problem. Under the current FCC, the general trend is toward rate deregulation.

The greatest drawback is too much competition from similar technologies.

Advisers generally recommend buying into the business today, rather than applying for new channels. A hypothetical radio common carrier in one of the top 30 markets with 10,000 subscribers could command a price of $8-$9 million today, according to an industry source. Less than half of that represents the value of hard assets.

As an example of how fast the new pagers are catching on, Radio Contact Corp. of Denver has grown from 6,200 units in 1981 to 8,500 subs in 1983, and 11,000 subscribers today, according to Bob Speer, director of marketing.

When it started, paging was just for doctors, Speer says. Now it's getting popular with media people, airline pilots, flight attendants, computer engineers, railroad workers, and expectant fathers and mothers. An added plus is the low-cost pager, such as that sold by Tandy for $99. Speer looks forward to a 12-25 percent growth rate per year. With 60 employees, Radio Contact is doing $3 million in annual sales, says President Bob Forsythe. (Radio Contact also sells, installs, and repairs mobile telephones and, since the Denver system launched in early July, is doing so at a rate of 10-15 units a day.)

Fit for a cable company?

For the cable operator looking to diversify, the paging business offers some advantages. First, the cable operator already has the billing and service system in place and the engineering expertise on the staff. Second, the paging business, like the cable business, has been slow to market itself and stands to benefit from a more aggressive approach.

Mobile players

Tykeson Associates Enterprises
RCC:
Lane County Communications, Eugene, Oregon; Lane Paging; Telecom Systems, Inc., Eugene, Ore.
Subscribers:
3,500 combined paging and mobile phone
Annual Sales:
$3 million
Employees:
80
Date Acquired:
1984
Contact:
Don Tykeson, owner Bend Cable Communications, Bend, Oregon (former president of Liberty Communications)

Cox Cable Communications
Cellular and RCC:
90% owner of Cybertel Corporation, St. Louis
Subscribers:
Since start-up July 16, 1984, approximately 250 for cellular mobile telephone: regular paging and conventional mobile telephone serves 11,000 in St. Louis and Illinois.
Employees:
45
Annual Sales:
$3 million
President:
David Bayer, Cybertel Corp.

Continental Cablevision, Boston, Mass.
Cellular:
17 applications; 10 in markets 61-90; 7 in markets 31-60. Will go into business in Boston as a resale agent for mobile phone service.
Senior Vice President:
Tom Willett

McCaw Communications, Bellevue, Wash.
Cellular:
56 applications pending: 5 in 31-60; 15 in 61-90; 30 in 91-120; Six applications granted and % ownership: Seattle, 16%; Portland, 16%; San Francisco, 23%; San Jose, 23%; Denver, 35%; Kansas City, 72%
RCC:
3 in Alaska; 6 in Western Washington state; 3 in Idaho;
Acquisition dates by group:
1972, 1974; and 1981.
Subscribers:
15,000 including telephone answering service and conventional mobile telephone
Employees:
100 plus
President:
Ed Hopper;
Vice president cellular:
John Stanton.

American Television and Communications
Cellular:
Applications pending in Boston, Honolulu, Orlando and Rochester

United Cable Television
RCC:
Has applied for 50 permits in 30 markets and has applied for license to operate nationwide paging system.

Deevy points out that without the hard-wire expense and the programming costs, a typical RCC can deliver its $30 product (on the average) more cheaply than the cable operator can deliver $30 worth of video channels.

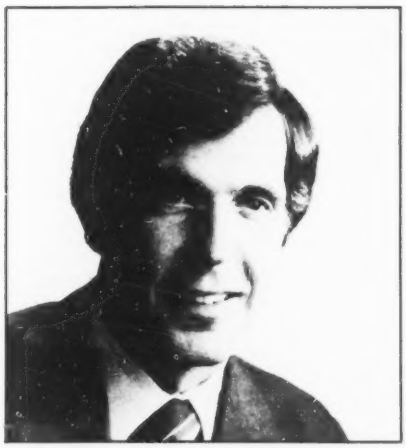
Compared to cable systems today, however, RCCs, in general, can be purchased at lower cash flow multiples—about 6-10 times cash flow—depending on the quality of the system and the size of the potential market. In major markets, the rule of thumb is $1,000 per subscriber.

The main difference between cable and the RCC business is one of competitiveness, Deevy points out. In every major market, there are four or five licensed providers; the FCC has authorized several additional paging modes which could be developed. For example, broadcasters may now use the FM subcarrier frequencies to provide paging services.

This makes paging a somewhat dicier proposition. "We have some questions about the economic viability of paging," says Jack Pottle, managing director of the Denver consulting firm of Brown, Bortz and Coddington. BBC has done cellular demand studies in about 100 markets. "We think there are ways to make money in paging, but it's an area where people have to be very careful, because it's not going to be an easy business. . . . Most of the barriers to entry are being eliminated and that means a lot more competition."

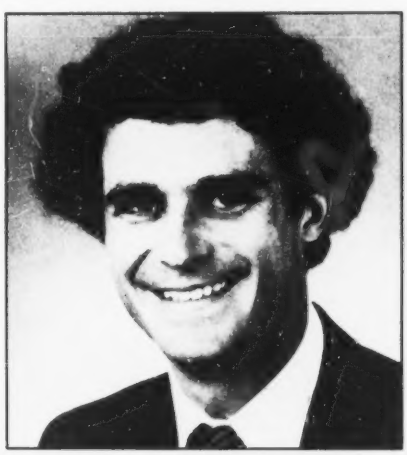
As to being a venture compatible with cable, Pottle says there are a couple of important differences. "Number one is that the cable industry historically has sold to consumers; mobile telephone and paging are marketed almost exclusively to businesses. To the extent that cable gets more into marketing to businesses, and personal communications gets more into marketing to the home, the fit is substantially better, but it isn't necessarily there right now," Pottle says.

Does Pottle think it's a good time to get into the business? Yes—but with some reservations. "If you want to go into paging," he says, "now is probably a relatively good time to do so . . . but we are still concerned about the excess spectrum and what we see as some real pressure on the margins in the paging business. You'd have to look very carefully and see what kind of added value you were bringing. Look at why you think you can do it better than an existing operator."



"You'd be surprised how many markets and carriers have been reluctant to introduce digital display paging—something we will take as given in major markets today."

George Perrin,
President of PageNet Inc.



"We think there are ways to make money in paging, but it's an area where people have to be very careful, because it's not going to be an easy business . . ."

Jack Pottle,
Managing Director,
Brown, Bortz and Coddington

For a cable operator thinking of getting in, valuing an RCC can be a tricky business. George Perrin, president of PageNet Inc., the Metromedia paging subsidiary, told attendees at an industry seminar sponsored by Titsch Communications in New York City last November that his pricing sense varies with the following factors:

- The predominant feature is the population base and the nature of the economic base, Sunbelt vs. Northeast industrial markets, for instance.
- The degree of overall pager penetration already in the market.
- What the competition charges, how many carriers are in the market, and what their share is of the market.
- The level of services offered. "You'd be surprised how many markets and carriers have been reluctant to introduce digital display paging. Something we will take as given in major markets today," he says.
- State certification. "In certain markets, you can get state certification if you're willing to pay the cost of the legal bills and the time, but by the time you've invested $100,000 and perhaps spent a year or a year and a half, a lot has changed in this industry."
- State regulation. "In some markets, you can come in and make an acquisition in an environment where you think you have relative protection, and find out a month or so later that the public utility commission or the legislature is considering regulation or regulation of the market. That changes the value."
- Degree of rate regulation. "We haven't run into that too much in the RCC. . . . But, when you're dealing on a bureaucratic level with a public utility commission that's used to an 8 to 10 to 12 percent rate of return with water companies, you'll pretty quickly opt for another course and seek out deregulation, in terms of entry, as a trade-off for ending up with that kind of business." Perrin suggested that as the paging industry gets bigger, it is going to attract more attention at meetings of state public utilities commissions—and that's something to think about.

Considering the unpredictable nature of state and local regulators, the paging business is not something for the faint of heart. The best position is to already have a position in the market. ■

Cable services subscriber count

Satellite-fed national service

Basic service	Affiliates	Subscribers	% change in subs from 5/31	
American Christian Television Systems (ACTS)	79	1,200,000	NA	5/84
Arts and Entertainment	1,500	10,500,000	NC	
Black Entertainment Television (BET)	340	7,000,000	+4.8	
Cable News Network (CNN)	6,167	27,654,000	+3.1	
CNN Headline News	1,695	12,570,000	+10.9	
C-SPAN	1,500	18,000,000	NC	
CBN Cable Network	4,619	24,300,000	+5.4	
Country Music Television	225	4,600,000	+10.9	
Entertainment & Sports Programming Network (ESPN)	7,994	32,700,000	NA	5/84
Eternal Word Television Network (EWTN)	165	2,410,000	+2	
Financial News Network (FNN)	1,000	17,000,000	+1.5	
The Learning Channel	523	4,617,840	NA	5/84
Lifetime	1,914	19,611,422	NA	5/84
Modern Satellite Network (MSN)	443	10,000,000	-1.4	
Music Television (MTV)	5,470	21,800,000	-.9	
The Nashville Network	2,000	15,900,000	NA	5/84
National Christian Network (NCN)	95	1,200,000	NC	
National Jewish Television (NJTV)	196	4,050,500	NA	5/84
Nickelodeon[1]	3,250	21,100,000	+8.5	
Prime of Life	NA	NA	NA	5/84
PTL Satellite Network	1,033	10,000,000	NC	
Satellite Program Network (SPN)	500	11,217,000	NA	5/84
Silent Network	206	6,300,000	NA	5/84
SIN Television Network[2]	276	28,338,300	+1.0	
Trinity Broadcasting Network	366	4,339,000	+3.7	
USA Network	4,000	24,300,000	NA	5/84
The Weather Channel	1,260	12,800,000	+7.8	
WGN-TV	5,618	13,958,948	+.4	
WOR-TV	1,009	4,639,646	+.7	
WPIX-TV	152	885,000	NC	
WTBS-TV	7,730	31,600,000	NC	
Pay service				
Bravo	152	235,000	+4.3	
Cinemax	2,100	2,700,000	NC	
The Disney Channel	1,712	1,132,389	NC	
GalaVision	200	130,000	NC	
Home Box Office (HBO)	5,400	13,500,000	NC	
Home Theater Network (HTN)	400	275,000	NC	
The Movie Channel	2,750	3,100,000	NC	
The Playboy Channel	457	720,000	+2.8	
Showtime	3,000	5,400,000	NC	
Audio service				
Cable Jazz Network	4	39,500	+34.7	
Just For Listening	NA	NA	NA	5/84
Lifestyle	174	2,500,000	NC	
Love Sounds	5	11,000	-.45	
Moody Bible Institute	34	535,879	+4.6	
Nice and Easy	7	52,000	+22.9	
Satellite Jazz Net, KKGO-FM	13	850,000	NC	
Satellite Radio Network	50	403,000	+.7	
SCAN	34	173,000	+5.8	
WFMT, Chicago	152	979,844	-1.5	
Text service				
AP News Cable	400	4,700,000	NC	
Dow Jones Cable News	163	2,081,428	-6.5	
Electronic Program Guide (EPG)	164	3,174,029	+4.9	
Genesis Storytime	9	450,000	+61.2	
Reuters News View	350	4,100,000	NA	5/84

Non-satellite-fed national service

Bicycled service				
The Cableshop	11	250,000	NC	
Fuji Network	6	3,733	+2.8	
Nippon Golden Network	5	8,105	NC	
The Pleasure Channel	16	16,000	+21.9	
Vector Consumer News	12	300,000	NC	
Vector Consumer Shopping Guide	16	490,000	NC	

Regional entertainment service

Regional services	Affiliates	Subscribers	% change in subs from 5/31	
Atlanta Interfaith	7	128,000	NC	
Bay Area Religious Channel (BARC)	5	107,100	+1	
Buffalo Sabres Hockey	13	450,000	NC	
Home Sports Entertainment—Dallas	NA	NA	NA	5/84
Home Sports Entertainment—Houston	56	52,500	+10.5	
Home Team Sports	15	20,000	NC	
KTVT	NA	NA	NA	5/84
Life Newsvision	24	35,000	+68.0	
Madison Square Garden	52	1,674,000	+2.6	
Meadows Racing Network	19	275,000	NC	
MetroChannel	4	111,000	+1.7	
New England Sports	NA	NA	NA	5/84
Newsday Cable	1	232,000	+1.7	
PRISM-Philadelphia	89	370,000	-1.4	
Pro-Am Sports	35	19,914	+39.8	
Sonics Superchannel	11	22,000	-12.0	
SportsChannel (New England)	47	55,000	-.9	
SportsChannel (New York)	39	370,000	-20.0	
Sports Time	112	42,000	+4.8	
SportsVision	20	41,000	+19.5	
Sportsvue Network	22	18,500	NC	
Texas Cable Network	9	554,850	+1.4	
Video Music Channel	24	267,804	NC	
Z-Channel	21	95,655	NC	

Announced services

Non-satellite-fed service	Expected launch
The Games Network	TBA
Regional service	
Box Seat	Summer 1984
Satellite-fed service	
Almi Group Network	TBA
The Aloha Network	TBA
American Movie Classics	4th quarter 1984
Apollo Entertainment Television	4th quarter 1984
The BuenaVision Channel	TBA
The CableShop	1/85
The Channel Black	TBA
Comedy Entertainment Network Telecommunications Station (CENTS)	TBA
The Community Channel	TBA
Computer Radio	TBA
Episcopal TV Network	TBA
Just For Listening	TBA
Kidvid Network	10/84
Magicable	TBA
M-Net	TBA
More Time	4th quarter 1984
National Jazz Network	4th quarter 1984
The Nostalgia Channel	TBA
The Nostalgia Network	TBA
Pacific Cable	8/84
The Pleasure Channel	4th quarter 1984
The Professional Education Network	9/84
Satellite Concert Network	TBA
Star Video Music	11/84
Studioline	TBA
The UN Channel	TBA
The Work Channel	TBA

Note: Subscriber and affiliate counts are as of 6/30/84 unless otherwise indicated
NA denotes not available
NC denotes no change
TBA denotes to be announced

[1]As of May 1984, based on A.C. Nielsen National Meter. Subject to qualifications upon request
[2]Total SIN reach: Spanish speaking households: 3,368,300

Source: Subscriber and affiliate counts are provided by the program service for Titsch Communications Inc.

National cable advertising

This chart lists national advertisers on the basic cable networks during July 1984.

BET
Amtrax (R)
Anheuser-Busch (R)
Avon (R)
Carson Products (R)
Coca-Cola (R)
Eastman Kodak (R)
Ford Division (R)
Home Box Office (R)
J.C. Penney Co. (R)
Johnson & Johnson (R)
Kraft (R)
Mobil Oil (R)
Nike (R)
Pepsi-Cola (R)
Procter & Gamble (R)
Pro-Line (R)
Quaker Oats (R)
Sears (R)
Thompson Medical (R)
U.S. Marines (R)
U.S. Postal Service (R)
U.S. Treasury Dept. (R)
Warner Bros. Inc. (N)
Wrigley's (R)

CNN[1]*
Admiral (R)
American Express (R)
American Home Products (R)
Anheuser-Busch (N)
Apple Computer (R)
Ashton-Tate (R)
Benihana (R)
Bristol Myers (R)
Cannon (N)
Chevrolet (R)
Clorox Co. (N)
Disney Co. (R)
Eastern Airlines (R)
Family Circle Magazine (R)
Federal Express (R)
Ford Motor Co. (R)
General Foods (R)
Honda (R)
J.G. Durand (R)
Kelloggs (R)
Kikkoman International (R)
K-Mart (R)
KLM Airlines (R)
Kodak (N)
Mazda Motors (R)
Nabisco (R)
Olivetti (R)
Paine Webber (R)
Paul Masson Wines (R)
Procter & Gamble (R)
Prudential-Bache Securities (R)
Publishers Clearing House (R)
Ralston Purina (N)
Runner's World Magazine (R)
Sears (R)
7-Up (N)
Shell Oil (N)
Sonny's Barbeque (R)
Thomas J. Lipton (R)
Time-Life (R)
Toshiba (R)
Toyota (R)
20/20 Eye Drops (R)

CNN Headline News[2]*
Allstate Insurance (R)
Apple Computers (R)
Colonial Penn (R)
Combe Inc. (R)
Dow Jones (R)
Family Circle Magazine (R)
General Electric (R)
Gulf Oil Corp. (R)
J.D. Durand (R)
Jeffery Martin (R)
John Hancock (N)
Kelloggs (R)
KLM Airlines (R)
MO Hickorey Corp. (R)
National Republican Committee (R)
Nestles (R)
Procter & Gamble (R)
Richardson-Zick (R)
Speed Queen (R)
Tender Corp. (R)
Time-Life (R)
Toshiba (R)
Toyota (R)
20/20 Eye Drops (R)
Urban General (R)
Visa USA (R)
Wrigley's (R)

C-SPAN
AT&T (R)
IBM (N)
Merrill Lynch (R)

Dow Jones Cable News
Barron's (R)
Charles Schwab & Co. (R)
Wall Street Journal (R)

FNN
American Airlines (R)
Avis (R)
Buick (R)
Campbell Corp. (R)
Chrysler (R)
Ford Corp. (R)
Hyatt Hotel (R)
Kansas City Board of Trade (R)
Merrill Lynch (R)
Micro Age (R)
Minolta Copiers (R)
Ramada Inn (R)
Shearson/American Express (R)

MSN[3]
Anheuser-Busch (R)
Archway Cookies Inc. (R)
Ciba Pharmaceutical (R)
CONOCO, Inc. (R)
E.I. DuPont DeNemours & Co. (R)
General Mills (R)
General Motors (R)
Hershey Foods (R)
Mattel Inc. (R)
Mercedes Benz of North America (R)
Midcon Corp. (R)
NASA (R)
Park Row Publishers (R)
Phillip Morris Inc. (R)
Upjohn Inc. (R)
U.S. Army Corp. of Engineering (R)
U.S. Dept. of Transportation (R)
U.S. Olympic Committee (R)
Wrangler (R)

National Jewish Television
Bank Hapoalim (R)
Coleco (R)
Crazy Eddie Stores (R)
Goody Products (R)
Hertz (R)
Jerusalem Post (R)
Sheraton Hotels (R)

Weather Channel
American Home Products (R)
American Motors Corp. (R)
Anco Wiper Blades (R)
Armour Dial (R)
AT&T Communications (R)
Borden (R)
California Tree Fruit Agreement (R)
Carter-Wallace (R)
Clorox (R)
J.C. Penney (R)
Johnson & Johnson (N)
Kraft Foods (R)
Phillips Petroleum (R)
Procter & Gamble (R)
Prudential-Bache (R)
Quaker Oats (R)
Ralston Purina (R)
Sears Portrait (R)
Thomas J. Lipton (R)
United (R)

WTBS[4]*
Air Force Reserve (R)
Alberto (R)
Allstate (R)
American Cynamide (R)
American Express (R)
American Home Products (R)
Apple Computer (N)
Buick (N)
Champion (R)
Citibank (N)
Coca-Cola USA (R)
Dodge (R)
Dow Chemical (N)
Duracell (R)
Emery (R)
Fayva (R)
Frito Lay (R)
General Foods (R)
General Mills (R)
Gulf Oil Corp. (R)
IBM Corp. (R)
Jeffery Martin Inc. (R)
Kelloggs (R)
Kentucky Fried Chicken (R)
Levi Strauss (R)
Miller Brewing (N)
Nabisco (R)
Procter & Gamble (R)
Thomas J. Lipton (R)
United Parcel (R)
Urban General (R)

R denotes renewal client.
N denotes new client.
Approximate number of advertisers for July 1984 [1]172 clients. [2]50 clients. [3]87 clients. [4]196 clients.
*Listing is comprised of June advertisers.
Source: Advertising clients are provided by the programs services to Titsch Communications Inc.